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## How to Write a Teaching Note

### Introduction

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A teaching note is the foundation upon which a successful case study is built. The purpose of the teaching note is to provide instructors with a “how to” guide for facilitation of the case study. A good teaching note will ensure that a case will give professors a road map for class discussion and serve as a starting point for instructors who would like to adapt the material to their classroom needs.

While some recommend that the teaching note be written after the case study, it is best to write the teaching note and case in parallel. It should be treated as a work in progress and developed simultaneously with the case study.

While the structure of the teaching note may vary from one case study to another based on content and methodology, a well-structured teaching note is generally about five to seven pages in length and contains the following seven components:

- Case Overview
- Learning Objectives
- Pedagogy
- Assignment Questions
- Case Analysis
- Teaching Plan
- Conclusion

### Case Overview

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The case overview is a one- or two-paragraph executive summary of a case. The case overview is often what professors read first to determine course applicability and relevance. Consequently, the overview should capture the essence of the case and the primary business challenge. When writing the case overview, it is important to be clear and concise.

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## Learning Objectives

A good case is written with concrete learning objectives in mind. The teaching note should contain two to five learning objectives with measurable learning outcomes stated in bullet point format.

Teaching objectives should specify exactly what students should know and be able to apply after they finish reading and discussing the case. Words that leave room for ambiguity about what is expected of the student should be avoided. “Understand,” for example, should be replaced with action verbs such as “explain,” “interpret,” “outline,” “discuss,” “distinguish,” “predict,” “restate,” “translate,” “compare,” or “describe.” The commonly used “demonstrate” should be rephrased with words such as “solve,” “show,” “use,” “illustrate,” “construct,” “complete,” “examine,” or “classify.” (See **Figure 1** for verbs recommended in Benjamin Samuel Bloom’s taxonomy.)

**Figure 1**  
**Verbs to Assess Levels of Bloom’s Cognitive Domain**

Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
Define	Describe	Describe	Analyze	Arrange	Appraise
List	Discuss	Discuss	Calculate	Assemble	Assess
Memorize	Explain	Explain	Compare	Collect	Choose
Name	Express	Express	Contrast	Compose	Compare
Recall	Identify	Identify	Criticize	Construct	Estimate
Record	Locate	Locate	Debate	Create	Evaluate
Relate	Recognize	Recognize	Diagram	Design	Inspect
Repeat	Report	Report	Differentiate	Formulate	Judge
	Restate	Restate	Distinguish	Manage	Rate
	Review	Review	Examine	Organize	Revise
	Tell	Tell	Experiment	Plan	Score
			Inspect	Prepare	Select
			Inventory	Set up	Value
			Question		
			Relate		
			Solve		
			Test		

Source: Miller, W. R., and R. F. Miller. *Handbook for College Teaching*. Sautee Nacoochee, GA: PineCrest Publications, 1999.

Rather than leaving the student with an abstract understanding of the learning objectives, these action verbs provide a clear link between the knowledge gleaned from the facts of the case and how the student should apply critical thinking and problem solving in a real-world environment.

## Pedagogy

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The pedagogy<sup>1</sup> of the case, which tells the instructor whom the case is intended for, addresses three components:

**Audience of the case:** Whom the case is relevant to—undergraduate or graduate students, the disciplines, and if the case can be adapted to another level or discipline.

**Prerequisites:** The business concepts students must understand before tackling the case.

**Supplemental materials:** Materials that can be used by students and instructors to expand their understanding of the case, including videos, articles, and other reference materials.

## Assignment Questions

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These are the questions that are provided to students to assist them with preparing a case analysis. The purpose of the assignment questions is to focus a student on the specific challenges facing the case protagonist in order to develop some analysis points prior to class. When students prepare their case analysis prior to class, the class discussion becomes more enriching and students can delve deeper into specific topics. Students should be encouraged to think both specifically and broadly about these questions. They should also be prepared to defend and rationalize their solutions in class.

## Case Analysis

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The case analysis is the heart of the teaching note. This section provides a road map on how to lead a case discussion. It also provides careful analysis and detailed insights into the case and its associated readings. The analysis should offer comprehensive answers to the list of assignment questions. If the case includes quantitative data, it might suggest ways to use the data and techniques to be used for analyzing the data.

## Teaching Plan

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The teaching plan is an outline on how to allocate time within class. For most business school courses, this is a 75- to 80-minute session. Typical components of a teaching plan are:

- **Class introduction:** The key points of the case
- **Assignment questions**
- **Wrap-up points**
- **Supplemental teaching components:** Some cases come with supplemental material such as video clips, audio, or in-class exercises. You should carefully plan when to use these supplemental components in class.
- **A board plan:** A listing of topics, a suggested order in which to introduce them, key questions within each topic area, and identification of items that are important to get on the board
- **Epilogue:** The epilogue of the teaching plan should explain what the company or protagonist actually did. The instructor should provide students with this information at the conclusion of the case discussion.

## Conclusion

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The conclusion to the teaching note should be used to provide additional clarity on the teaching objectives and state the takeaways or the elements of the case the students should reflect upon.

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<sup>1</sup> The method and practice of teaching, esp. as an academic subject or theoretical concept.



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